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ABSTRACT

This operations notebook is constructed so that it can serve as a practical guide and quick reference for elementary school principals. It has a checklist-type format, and the entire document can be inserted into a three-ring binder. The eight topics covered include preparation for the opening of school, contract management, handling emergencies, and management of the instructional program, the school budget, categorical aid programs, support services, and school climate. A list of publications is provided to assist elementary school principals in these areas. (Author/ID)

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ACSA OPERATIONS NOTEBOOK 23

ELEMENTARY PRINCIPALS: A CHECKLIST TO SUCCEED

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Second printing

ASSOCIATION OF CALIFORNIA SCHOOL ADMINISTRATORS, SEPTEMBER 1978

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TABLE OF CONTENTS

	Page
Introduction	1
Opening of School	
Know Your School Plant	1
Know Your Opening Needs	1
Know Your Programs	2
Know Your Staff Organization and Needs	3
Know Your Students	3
Know Your Community	4
Know Your Master Calendar	4
Contract Management	
Some Do's and Don'ts	5
Managing The Instructional Program	7
Managing The School Budget	9
Managing Categorical Aid Programs	11
Establishing The School Site Council	12
Managing The Support Services In Your School	
Food Services	13
Transportation	14
Custodial and Building Maintenance	15
Managing Your School Climate	
Staff	17
Community	17
Students	18
Public Relations	19
Management Of Yourself	21
Self Renewal	23
How To Say "No"	23
Decision Making	24
Handling Emergencies	25
Publications To Assist Elementary Principals	31

INTRODUCTION

This Operations Notebook is constructed so that it may be a practical guide and quick reference for elementary school principals. It is not intended to be a comprehensive treatment of the roles and functions of the elementary principal.

A check list type format has been utilized so that one need not wade through a maze of narrative writing when seeking information.

It was the intent of the authors that this notebook be inserted into a large three-ring binder so that you may continually add material. Hopefully this will ensure a notebook that will not be outdated in the near future.

This notebook is comprised of eight sections each focusing on aspects of the various skills required to lead an elementary school. We hope that you will find it useful and refer to it often.

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for this Operations Notebook

STARTING THE YEAR

KNOW YOUR SCHOOL PLANT

- [ ] Have you taken a tour of the school plant?
- [ ] Are there any double sessions?
- [ ] Are there any building programs or maintenance projects in process or scheduled to start soon?
- [ ] Are there any safety hazards or needs for repair?
- [ ] Is the plant clean, and will it be ready for opening day?
- [ ] Are the classrooms furnished adequately? Are there expected deliveries of furniture?
- [ ] What are the storage facilities? Where are textbooks, supplies and equipment stored?
- [ ] Is there an up-to-date equipment inventory?
- [ ] What security measures are necessary? Who has master keys? Which keys are distributed to personnel?

KNOW YOUR OPENING NEEDS

- [ ] Are there sufficient supplies, textbooks, and equipment for all classrooms and the office?
- [ ] What is the procedure for requesting, requisitioning, checking, and delivery of supplies?
- [ ] Is there an updated staff handbook or information bulletin regarding school policies and procedures?
- [ ] Have you prepared an information bulletin for parents?
- [ ] Did the school qualify for free lunch and breakfast? Have the bulletins regarding National Lunch Program and lunch applications been sent home?
- [ ] Have plans for an orientation meeting for kindergarten parents been made, and has the kindergarten handbook been updated?
- [ ] Do you know the balance in all budgets, and are you knowledgeable about accounting procedures (Title I/S590, ECE, Follow Through, Chacon, SCAD, and Special Education)?
- [ ] Are you familiar with the procedures for emergency drills and handling other emergencies?

- [ ] Have you planned office manager procedures?
- [ ] Have the necessary schedules or information bulletins been prepared?
- [ ] Have you made plans for the first staff meeting in September and prepared a packet for each staff member?
- [ ] Have staff members been notified about that scheduled meeting?
- [ ] Have you planned for volunteers and paraprofessional staff members to help on the first day in enrolling pupils and directing all pupils to classrooms?
- [ ] Have you checked the enrollment daily? Have the counselors and teachers phoned parents of students who have not arrived? Do you have a plan for reorganization, if needed?
- [ ] Have you made your onw list of persons to call for requests, questions, and assistance (area offices, central offices, operations and maintenance)?

KNOW YOUR PROGRAMS

- [ ] What are the latest plans for the Student Integration Program for your school?
- [ ] What special programs does the school have?
- [ ] What system has been used in diagnosing and prescribing for the needs of individual children?
- [ ] Has a variety of instructional materials and learning strategies been utilized?
- [ ] Has your school utilized computer services?
- [ ] If you have specially-funded programs, have you checked the A-127ES and all budgets?
- [ ] If you have Non-English Speaking (NES) and Limited English Speaking (LES) pupils, are you familiar with the Chacon-Mascone regulations?
- [ ] If your school has been visited by a Monitor and Review (MAR) Team, have you reviewed the evaluation?
- [ ] Have staff needs been assessed and have tentative plans been made for a staff development program?
- [ ] What assistance is available locally and at the central office to improve the instructional program?
- [ ] What has been the plan for articulation of the instructional program to insure continuous progress?

KNOW YOUR STAFF ORGANIZATION AND NEEDS

- [ ] Have you met with the former principal?
- [ ] What commitments were made for this year?
- [ ] Are there any critical issues which need immediate attention?
- [ ] Have all staff members been assigned? Special duties?
- [ ] Have you met with all key personnel, assistant principal, faculty members, nurse, counselors, school secretary, cafeteria manager, aides, custodian, and playground director?
- [ ] Who are considered the leaders of faculty and classified groups?
- [ ] What is the relationship of the staff to the community?
- [ ] Do you understand your role in relation to collective bargaining?
- [ ] What are the hours, schedules, and job descriptions of all staff members?
- [ ] What is the racial-ethnic composition of the staff? Have there been any mandatory transfers in or out to achieve a balanced staff?
- [ ] Which staff members are bilingual?
- [ ] What is the role of the faculty chairperson and grade level chairpersons, and when are they chosen?
- [ ] Do you have a plan for orienting new teachers and aides?
- [ ] Do you have current home phone numbers of all staff members? What other information would you need in event of an emergency?
- [ ] How has the staff been involved in planning, implementing and evaluating program budgets and local policies?
- [ ] Have you planned the schedule for staff meetings?

KNOW YOUR STUDENTS

- [ ] Have all students been assigned to classrooms?
- [ ] What is the organizational pattern (self-contained, ungraded, team teaching, departmentalized)?
- [ ] Is there a master list of student assignments?
- [ ] What is the racial-ethnic make-up of the student population?
- [ ] How many NES and LES students were enrolled last year?
- [ ] What is the general achievement level of students?

- [ ] What are the expected standards of pupil behavior?
- [ ] What are the procedures for handling discipline, including suspensions and expulsions?
- [ ] What are the referral procedures to the nurse, counselor, speech teacher or therapist, psychologist, community agencies, etc.
- [ ] What are the school rules for such things as riding bicycles to school, taking books home, pupils leaving the classroom, and pupils going home for lunch?

KNOW YOUR COMMUNITY

- [ ] What is the image of the school in the community?
- [ ] Are there any critical issues which need immediate attention?
- [ ] Have you taken a tour of the community?
- [ ] Who are the key leaders that truly represent the view of the community?
- [ ] How have parents and members of the community been involved in planning, implementing, and evaluating the educational program and budgets?
- [ ] Have plans been made for parent education classes and workshops?
- [ ] Have plans been made with staff for orientation meetings with parents or for a "Back to School Night?"
- [ ] Which organizations are active in the community?
- [ ] What provision has been made for communication with parents and members of the community?

KNOW YOUR MASTER CALENDAR

- [ ] Have you recorded the dates for district, area, complex or cluster, and local meetings on your master calendar for the entire year?
- [ ] Have you planned the yearly master calendar for the school with the staff and parents?
- [ ] Have you given a yearly master calendar of activities to the staff and parent..?

Reference bibliography:

Los Angeles Unified School District
School Organization Checklist for Elementary Administration
August 30, 1977
Corinne E. Brandt

9

CONTRACT ADMINISTRATION

1. Contract administration is the process of implementation, interpretation and enforcement of the agreement.

2. Contract administration is the means through which the objectives of the collective bargaining relationship are in large part fulfilled.

3. Contract administration should have a centralized authority to make uniform interpretations and decisions.

4. Contract administration should relate only to the contract.

5. Contract administration involves contract interpretation.

6. Contract interpretation establishes practices which in turn become the basis for future negotiations.

7. A grievance may be filed by an employee if that employee believes that the contract has been violated by the site administrator.

SOME DO'S AND DON'T'S

- ☐ DO become thoroughly familiar with every aspect of a new contract.
- ☐ DO make a sincere effort to implement every aspect of a contract in a fair and impartial manner.
- ☐ DO implement terms of the contract.
- ☐ DO be firm but fair in rendering decisions which are unpopular in light of the new collective bargaining atmosphere but are consistent with the new contract.
- ☐ DO seek needed clarification from the person who represents the school board in the meet and negotiate process.
- ☐ DO be open minded and generally avoid taking rigid and unbending positions.
- ☐ DO make every effort to foster an atmosphere of staff cooperation and togetherness.
- ☐ DO keep the person who represents the school board in the meet and negotiate process informed regarding any and all attempts to circumvent provisions of the contract.
- ☐ DO guarantee employees the right to present their grievances and have them adjusted without intervention from the exclusive representative providing such adjustment can be reached prior to arbitration.
- ☐ DO allow employee associations representative the right to have access at reasonable times to areas in which employees work; to use bulletin boards, mailboxes, and other means of communication subject to reasonable regulation; and to use school facilities at reasonable times to hold meetings concerned with the exercise of the rights guaranteed by the Rodda Act.

- [ ] DO allow employees who are not members of any employee association the right to sign a petition requesting a representative election.
- [ ] DON'T engage in collective bargaining at local school site.
- [ ] DON'T do or say anything that would give anyone the impression that you are anti any person, organization, or aspect of the contract.
- [ ] DON'T allow yourself to be intimidated by over zealous activists.
- [ ] DON'T take condescending positions that will make life difficult for your neighboring administrators.
- [ ] DON'T abdicate educational leadership role at local school level.
- [ ] DON'T be afraid to take disciplinary action if and when circumstances indicate the need for action.
- [ ] DON'T abandon worthwhile standards and principles in effort to avoid confrontation or enhance popularity.
- [ ] DON'T be arbitrary, capricious or discriminatory.
- [ ] DON'T resolve any grievance in such a way that the resolution is inconsistent with the terms of the written agreement.
- [ ] DON'T resolve any grievance until the exclusive representative has received a copy of the grievance and proposed resolution, and has an opportunity to file a response.
- [ ] DON'T become engaged in meeting and negotiating at the local school level.
- [ ] DON'T impose or threaten to impose reprisals on any employee.
- [ ] DON'T discriminate or threaten to discriminate against any employee.
- [ ] DON'T interfere with, restrain or in any way coerce any employee who chooses to exercise any of the rights he or she is guaranteed by the Rodda Act.
- [ ] DON'T deny employee associations any of the rights they are guaranteed in the Rodda Act.
- [ ] DON'T in any way interfere with the formation or functions of any employee association.
- [ ] DON'T contribute financial or any other support to any employee association.
- [ ] DON'T encourage employees to join any one association in preference to another.

MANAGING THE INSTRUCTIONAL PROGRAM

FIRST PRIORITY GOAL:

The principal should become increasingly more knowledgeable in instructional processes, including curriculum, and procedures with which to meet the needs of all children. This necessitates a knowledge of materials and a recognition of good teaching.

Administrators should spend time to determine ways to be successful within necessary constraints by establishing techniques and priorities which provide for the optimum in instructional leadership. Two examples of possible techniques are:

1. Classroom overview

   The following information needs to be obtained periodically to give principals a running picture of the classroom so that as they visit, they not only know from plan books the daily objectives, but also the overall picture for the students in that room.

   - [ ] Each teacher should provide the principal with the reading grouping and material needs for each child in the reading program throughout the year.
   - [ ] The principal should be provided with the math grouping, math texts, combination test progress for children in the math program.
   - [ ] Records of spelling levels and progress should be easily seen on a chart in the classroom or a duplicate filed with reading and math planning.
   - [ ] A basic overview of the social studies chronology should be included in each class' plans for the year.
   - [ ] Anything else that will provide the principal with first hand classroom information.

2. Working with teachers

   Scheduling regular teacher meetings by grades or sets of grades to monitor and guide the instructional program tends to maintain a sense of direction, evidence an interest of progress, and provides additional insight into the total educational program. Utilizing the Course of Study at these meetings helps to maintain continuity for teachers and students.

SECOND PRIORITY GOAL: Human Relations

The principal should demonstrate the ability to function as an educational leader by:

- [ ] Leading his/her staff in a manner which promotes the positive, develops creativity and initiative, and demonstrates acceptance of responsibility.

- ☐ Promoting within the students a desire for improvement in both their academic and social stature
- ☐ Working successfully within the district administrative policies
- ☐ Keeping communication lines open between the school and its community - keeping everyone positively informed
- ☐ Working for change, when change is needed, in a manner which would tend to increase cooperation and improvement of instruction

THIRD PRIORITY GOAL: Educational Environment

The principal will provide, within available resources, the best possible environment in which to nurture the learning process. This includes:

The Immediate Classroom

- ☐ Provision of all instructional tools available for learning growth
- ☐ Maintenance and accountability for that classroom, its materials and appearance

The School Plant

- ☐ Ensuring that the total plant, as established, is maintained in such a way that it can contribute positively to the total educational growth of its students and staff

The principal must be aware of all facets of the total educational environment.

Meetings with staff members, both individually and in groups, to discuss, gain input, and provide direction regarding ways of the most efficiently meeting the physical needs of the educational program are important.

Scheduling regular inspections of the school plant can ensure maintaining the buildings and grounds in the best possible condition.

Establishing practical accounting practices in such areas as attendance, supplies and instructional materials, will help to ensure an effective educational environment.

Principals as optimal educational leaders, must continually evaluate their instructional role, their human relationships in the school community, and the physical environment in which learning is to take place to ensure that they are providing the best possible instructional program.

MANAGING THE SCHOOL BUDGET

Budget responsibilities of the school principal vary from district to district. One principal may have a very small supply budget to administer while another may have an extensive categorical aid program budget to develop and administer. Therefore, with such a variety of possibilities, this section can only suggest some guidelines in managing the budget. In developing and managing any school budget your own district's policies and procedures must be referred to and adhered.

DEVELOPING A BUDGET

The budget is a plan for district expenditures to meet the goals and objectives of your school. By its structure it is to be considered in its entirety each year. The theory of budget development is to start with nothing and put an expenditure pattern together for operation during the next fiscal year. By its structure also there are many expenditures that will be of necessity continued year after year. Salaries and related fixed charges, basic supplies, utilities, insurances to protect persons and property, emergency repair for safety and health.

All budgets whether they are categorical aid or school operating budgets must conform to the California School Accounting Manual. The manual provides a system of program accounting requiring a structure of coding for income and expenditures.

Procedure Check List

Determine your instructional goals and objectives.

Translate goals and objectives into an instructional program.

Review all rules and regulations, not only local but state and federal, in determining how you may expend your funds.

Determine the processes and procedures, tools, personnel, etc. required to implement your program.

Determine available revenues.

Reassess your expenditures to bring them in line with your revenues.

Code your expenditures in accordance with the California School Accounting Manual.

Submit your budget plans to your immediate supervisor for approval (or whomever gives approval to budgets in your district).

MONITORING THE BUDGET

Simple record keeping will prevent you from getting into trouble somewhere down the line. Do not depend upon your district accountant to keep you up-to-date on funds available to you in the various coded categories.

Develop a simple ledger. Provide for dates of transactions, amounts of disbursements, and the balance column for each budget category you are to administer at your school site. Then just simply deduct from your balance column each new expenditure and add each additional allocation. This will provide you with a running balance at all times.

EXAMPLE

BUDGET CODE 4511 8012

Date	Allocation	Amount encumbered	Balance
8-1-77	$3,012.86		
9-6-77		$ 11.49	$3,001.37
9-15-77		2.00	2,998.37

BUDGET CODE 5210 8012

Date	Allocation	Amount encumbered	Balance
7-1-77	$ 500.00		$ 500.00
10-3-77		$ 295.18	204.82
1-5-78	50.00		254.82
2-19-78		77.93	176.89

MANAGING CATEGORICAL AID PROGRAMS

- [ ] Do you know what your categorical fundings are?
- [ ] Do you know the composition of your school advisory and/or school site councils?
- [ ] Are your councils balanced according to law?
- [ ] How were they formed?
- [ ] Do they have a set of by-laws or procedural format?
- [ ] Have necessary workshops, in-service programs and needs assessment been planned?
- [ ] Has advanced planning been established for workshops?
- [ ] Have all concerned participants been involved?
- [ ] Have all involved teachers implemented the early steps of the project?
- [ ] Do all staff members understand the project and the timeline sequence?
- [ ] Is there some form of ongoing assessment of program/project implementation?
- [ ] Are evaluation procedures appropriate?
- [ ] Do you know the budget classification categories?
- [ ] Have essential components been budgeted?
- [ ] Has a timeline of expectations been developed, including interim evaluations?
- [ ] Have all those involved been made aware of the timeline of expectation?
- [ ] Are there adequate funds to fulfill the project expectations?
- [ ] Are there alternate sources of funds available?

ESTABLISHING THE SCHOOL SITE COUNCIL

- ☐ Do you know the requirements of AB 65 - Mandatory School Site Councils?
- ☐ Have you established procedures for forming the School Site Council?
- ☐ Do you understand and have you communicated to your Council members their role and parameters?
- ☐ Have you developed methods of assessing the demographic characteristics of your school community?
- ☐ Do you have a plan for achieving equitable representation on the Council?
- ☐ What is the size and structure of the Council?
- ☐ Are there established procedures for selection and replacement of Council members?
- ☐ Have provisions been made for training workshops and activities?
- ☐ Have you prioritized needs?
- ☐ Have target dates for programs been set?
- ☐ Are parliamentary and decision-making procedures understood by all Council members?
- ☐ Has a set of by-laws as a framework for operation been developed?
- ☐ Have the roles of Council members been defined?
  - ☐ Chairperson
  - ☐ Committee Chairpersons
  - ☐ Members
- ☐ Have procedures for conducting meetings been established?
  - ☐ Agenda - Information Items, Action Items
  - ☐ Roll Call
  - ☐ Minutes
  - ☐ Committee Reports
  - ☐ Evaluation Procedures

Reference - Bibliography - The Establishing and Functioning of School Site Councils, Mary M. Nur & Les Birdsdall, California Staff Development Network. A Training Resource Manual, April, 1978.

MANAGING THE SUPPORT SERVICES IN YOUR SCHOOL

A principal's responsibility in the management of Support Services includes three areas:

1. Food Services
2. Transportation
3. Custodial and Building Maintenance

The following is a principal's checklist of responsibilities and some ideas on how to involve your support services more effectively in your school.

Checklist of Principal's Responsibilities - Food Services

- ☐ Establish schedules, proper supervision, and behavorial standards for mid-morning nutrition, lunch, day care snacks, breakfast programs.
- ☐ Confer with the Food Service Manager and/or Director of Food Service in planning and implementing the food service program in areas of mutual concern and responsibility.
- ☐ See that the behavior and attitudes of students and staff in the lunchroom and classroom are consistent with the Nutritional and Educational Goals of the District, as tailored to the needs of the school.
- ☐ Promote good relations and mutual understanding and respect between students, food service employees, other staff, and the community; an excellent opportunity is National School Lunch Week, held in October each year.
- ☐ Distribute, receive and verify applications for free and reduced price lunches and breakfasts.
- ☐ See that the lunch count is given on time to the Food Service Manager.
- ☐ See that the reading of the menu in the classroom is a positive learning experience for students and teacher.
- ☐ See that school food sales conform to District policy.
- ☐ Complete Category of Eligibility survey twice per year, as required by the State Department of Education.
- ☐ Promote and refer inquiries on nutrition or nutrition education materials to Food Service Manager.
- ☐ See that adequate notice is given to Food Service Manager regarding special functions.
- ☐ Complete Vandalism Report in case of loss due to cafeteria break-in.
- ☐ Complete Accident Report in case of injury to food service employee.
- ☐ Send home monthly menu to parents.

Checklist of Principal's Responsibilities - Transportation

Transportation to and from school by school bus is a privilege and not required by law.

☐ Have you developed and communicated to your bus driver any positive ways of maintaining proper behavior on the bus. For example, one bus driver gives happy grams to students who have behaved well for a designated period of time.

☐ Establish a definite procedure for support of the bus driver's maintenance of discipline of the students riding the school bus. Minimum penalties, as listed below, should be used as guidelines for infractions of established rules:

1st citation -- Warning of possible bus riding suspension
2nd citation -- 3-day bus riding suspension
3rd citation -- 2-weeks bus riding suspension
4th citation -- 4-weeks bus riding suspension
5th citation -- Balance-of-the-year bus riding suspension

☐ Establish bus riding guidelines as suggested:

The following list of student actions constitute violations of the established rules and regulations:

Abusive body contact (slapping, hitting, poking, shoving, pulling hair, etc.) in or when loading or unloading bus.

Using other than the student's regularly designated bus stop.

Using profane language or obscene gestures.

Putting any part of body out of bus window at any time.

Any movement OUT of seats while bus is in motion.

Riding bus after receiving no ride penalty.

Creating excessive noise.

Any improper bus stop procedures, (not lining up, rock throwing, playing in streets; or any property damage at bus stops).

Unauthorized opening, closing, or tampering of any kind with bus doors or emergency exits.

Any type of damage or defacing of bus.

Lighting of matches, cigarettes, smoking on bus.

Throwing any objects in, out of, or at the bus.

Transporting live animals, reptiles or insects on a school bus. Science specimens are to be encased in safe containers of plastic or cardboard - glass containers will not be allowed on the buses.

Eating or drinking on the bus.

Failure to obey driver, and disrespect to the bus driver.

Giving improper identification when requested by driver.

Tampering with radio or bus controls.

- [ ] Coordinate with District Office Transportation Supervisor to assure opening day busing schedules.
- [ ] Coordinate special education busing for students throughout the school year.
- [ ] Coordinate busing for special events and class field trips throughout school year.
- [ ] Coordinate twice a year bus evacuation drill with all students as required by State of California Law.

Checklist of Principal's Responsibilities
Custodial and Building Maintenance

Custodial

- [ ] Establish a daily custodial schedule for the on-site custodian which provides time for:
  - [ ] Opening and closing plant.
  - [ ] Checking of school grounds each morning for vandalism and/or hazardous situations.
  - [ ] Cleaning and servicing restrooms.
  - [ ] Cleaning and setting up cafeteria before and after lunch periods.
  - [ ] Ground pick-up and sweeping.
  - [ ] Trash disposal and classroom clean-up.
  - [ ] Cleaning and servicing auxiliary rooms.
  - [ ] Special jobs as needed, including community service activities.

Building Maintenance

- [ ] Take a periodic survey of school plant to determine and initiate repairs necessary to maintain building and grounds.
- [ ] Arrange building space as necessary to meet the needs of a changing program and fluctuating enrollment.

- [ ] Provide assistance for staff, PTA and other community groups for their activities.
- [ ] Provide for daily follow-up of vandalism and other damage reporting and repair.
- [ ] Supervise conduct of personnel and students in relation to site construction, equipment, etc.
- [ ] Provide daily check as to safety conditions in relation to grounds and building.
- [ ] Maintain evaluation on a periodic basis relative to building cleanliness, sanitation and eye appeal.
- [ ] Recommend improvements in grounds and buildings if needed.
- [ ] Instigate "vandalism prevention" programs with student body and community.

HERE ARE SOME MISCELLANEOUS IDEAS FOR THE SCHOOL PRINCIPAL IN MANAGING SUPPORT SERVICES

Your custodian, bus drivers, cooks, are the people in your school who are your FRONT LINE PUBLIC RELATIONS PEOPLE. . . current research shows that more of the public knows, and feels good about, your bus driver and custodian then they do you as a school principal. So, it's up to you to be sure these people feel good about the school . . . and sing its praises loud and clear!

- [ ] Include them in your opening of the school year staff meetings so they know what's going on.
- [ ] Ask them, along with your teaching staff, to start one new good public relations idea with students to improve your school image.
- [ ] Send letters to them once a year . . . not form letters.
- [ ] Send them "thank you notes" when they do a good job.
- [ ] Survey their hobbies and skills and utilize these talents with the students.
- [ ] Invite these people into your classrooms to see what's going on with the students.
- [ ] Send birthday cards to them on their day.
- [ ] Have a "honor your cook, custodian or bus driver" day.
- [ ] Send them copies of your school bulletins, etc.
- [ ] Keep them aware of legislation, etc., affecting the school.

GET THEM INVOLVED!

21

MANAGING YOUR SCHOOL CLIMATE

Listed below are some important factors to consider that contribute to a positive school climate. You must bear in mind that the climate of a school is something that is felt more than it is seen. It's crucial that principals take action to assure that members of the staff have the following "feelings."

- [ ] Staff members see themselves as contributing persons, having ideas that are listened to and considered?
- [ ] Staff members have a good feeling about their school and things that are happening at it?
- [ ] Staff members have opportunity for meaningful input on such things as budget, curriculum, books, supplies, and other important matters of the school?
- [ ] Staff members have a voice in determining content of staff development activities?
- [ ] Staff members feel a sense of obligation toward their fellow workers?
- [ ] Staff members cooperate with each other and generally keep agreements with each other?
- [ ] Staff members are given positive reinforcement (praise) periodically?
- [ ] Professional growth and development activities of staff members are given your support?
- [ ] You are available to your staff members during their free time or breaks?
- [ ] You are open to new ideas proposed by your staff?
- [ ] You are reasonable and fair with all staff members when dealing with them as individuals?
- [ ] Lines of communication are effectively established and work both ways with your staff?
- [ ] You have a genuine concern for each staff member as an individual?
- [ ] You have confidence in the ability of your staff to do a good job?

To maintain a positive school climate it's equally crucial to assure that parents have the following information.

- [ ] The yearly school calendar with all holidays, starting and dismissal times, etc.
- [ ] Bus routes and times.
- [ ] Auxillary services available for students such as speech, remedial help, nurse, special classes, etc.
- [ ] Procedures to be followed after a student has been absent (note or phone).
- [ ] Grade cards and parent conferences.

- [ ] Homework policies.
- [ ] Complaint procedures.
- [ ] Organizational patterns of the school (grade levels, departments, levels).
- [ ] Meal programs available to students (free, reduced).
- [ ] Parent volunteer programs at the school.
- [ ] Parent groups and meetings (P.T.A., S.S.C., School Advis.).
- [ ] Use of school phone by students.
- [ ] Schools discipline policy and procedures.
- [ ] Expected standards of pupil behavior and achievement.
- [ ] Referral procedures for nurse, counselor, speech, and other agencies in the community.
- [ ] Procedures for checking students out of school early for doctor's appointments etc.
- [ ] Procedures for transferring students when moving.
- [ ] Parent education classes available.
- [ ] Orientation meetings for parents.
- [ ] Critical issues needing attention.
- [ ] Lines of communication that are established to keep communication going both ways.
- [ ] Are parents welcomed when they visit the school.

It's also crucial that student morale and self-esteem is high to maintain a positive school climate.

- [ ] Are students given a voice in determining school rules and policies that have a direct effect on them?
- [ ] Are orientation meetings held for students covering rules, emergency drills, dress codes, homework, etc.?
- [ ] Does the school have an up-to-date student handbook?
- [ ] Do students show respect for other students as individuals?
- [ ] Do the students have pride in their school and feel good about things that are happening there?

23

- [ ] Do the students feel they are treated fairly and with the respect due them as individuals?
- [ ] Are students given positive reenforcement (praise)?
- [ ] Is there an emphasis on self-discipline for the students?

A PUBLIC RELATIONS PLAN FOR YOUR SCHOOL

To provide effective communications for your school, have you:

- [ ] Identified your internal publics, i.e. students, faculty, staff, other schools?
- [ ] Identified your external publics, i.e. parents, non-parents, senior citizens, community leaders, business leaders, ex-students, community and service groups, news media, etc.?
- [ ] Developed ways to communicate with your internal publics, i.e. staff meetings, assemblies, newsletters, small group meetings, advisory groups, handbooks, student councils, bulletin boards, face-to-face discussions, etc.?
- [ ] Developed ways to communicate with your external publics, i.e. newsletters, news media, telephone trees, coffee klatches, mini-tours, conferences, speakers bureau?
- [ ] Established ways to ascertain the information needs of your publics, i.e. questionnaires, participation in community groups, asking your secretary to log telephone questions by topics for a month?

MISCELLANEOUS TIPS FOR SCHOOL PR

Do you:

- [ ] Exhibit student work at PTA meetings, school board meetings, in the business community?
- [ ] Recognize outstanding programs and practices in the school. Have the staff members recognized at meetings, such as, school board, PTA, or School Advisory Councils?
- [ ] Recognize the community contributions of citizens, especially those who have been involved in the school?
- [ ] Have progress reports on various educational programs and activities at each regular school board meeting?
- [ ] Send thank you letters to staff, volunteers, and students who go beyond the call of duty?
- [ ] Invite citizens into your school to observe programs and conduct tours?
- [ ] Encourage teacher phone calls to absent teachers?

- [ ] Develop a small information packet on the school and its progress?
- [ ] Develop a community resource booklet or file?
- [ ] Organize a public relations committee?
- [ ] Promote exchange assemblies between schools?
- [ ] Revive the Parent/Staff talent show?
- [ ] Use the personal touch; organize a telephone tree on announcing important events?

MANAGEMENT OF YOURSELF

"The greatest tool you have is the purposeful and planned use of yourself."

TIME MANAGEMENT

The effective use of time requires the highest form of self discipline.

"Effective executives know where their time goes. They work systematically at managing the little of their time that can be brought under control."

Drucker.

Finding time to do the important things and organizing time so as to concentrate energies on critical issues is not difficult but does require:

a. Knowing what your responsibilities are.

b. Setting goals.

c. Establishing priorities in support of your goals.

d. Managing your time to accomplish your goals.

Most of us are not satisfied with the way we use our time. Good management procedures create time.

A good manager does two things well: He or she makes good decisions and is able to think creatively.

Remember that even the President hasn't one more minute a day than you have. You either master time or it masters you.

Remember that if you invest your time in thinking and planning, you will find you cannot only save time, but your days will be less frantic and less filled with emergencies.

A few suggestions follow:

- [ ] Avoid activities that are outside of your priorities.
- [ ] Plan your use of time daily, weekly, monthly, yearly.
- [ ] Evaluate your use of time with an activity log.
- [ ] Have your secretary keep a log for comparison.
- [ ] Concentrate your time on the major tasks.
- [ ] Reduce distractions.
- [ ] Develop an efficient calendar system.
- [ ] Know where your time goes.
- [ ] Let your staff know what you do with your time.

- [ ] Use message memos to save writing time.
- [ ] Keep a "To Do" list daily.
- [ ] If you can do only one thing a day, Do It!
- [ ] Delegate tasks to others.
- [ ] Don't get lost in the trivia.
- [ ] Plan your office time.
- [ ] Let your secretary handle as much detail as possible.
- [ ] Keep a clean desk.
- [ ] A cluttered desk wastes time and is a sure sign of being disorganized.
- [ ] Block out a large amount of time daily for planning in your major management areas.
- [ ] Outline the next day's work before leaving the office.
- [ ] Use an appointment book.
- [ ] Learn how to use wasted time.
- [ ] Use your secretary's talents to best advantage.
    - [ ] Develop and train him/her.
    - [ ] Encourage him/her to take initiative.
    - [ ] Keep him/her informed.
    - [ ] Check with him/her daily to clarify instructions, ask questions and set priorities for the day.
    - [ ] Have him/her handle as much of the detail and routine matters as possible.
- [ ] Control visitors by setting aside specific times for appointments.
- [ ] Have secretary screen visitors and calls.
- [ ] Keep meetings to a minimum.
- [ ] Keep meetings to the point.
- [ ] Prior to conclusion of meetings review briefly what now has to be done and by whom.

SELF RENEWAL

No administrator is so important that the program would fail without him or her. Someone was there before you and someone will be there after you have gone. In the meantime, it is necessary to plan to take time for yourself.

- [ ] Recognize that your supply of energy varies in a day. Check your pattern and ride your energy peaks.
- [ ] Periodically take a break to recharge.
- [ ] Switch jobs for a change of pace.
- [ ] Plan at least a half hour daily to cogitate, meditate, and just plain think about who you are, where you are going and how to solve some of those problems.
- [ ] Determine your goals and objectives in all major aspects of your life.
- [ ] Devote at least 30% of your work week to personal improvement in your managerial role.
- [ ] Take time for hobbies, friends, recreation and most important your family.
- [ ] Learn to take time to relax. Set maximum work and minimum relaxing time.
- [ ] Take your vacation!

HOW TO SAY "NO"

"Yes" to every request sets a precedent - everyone will ask! You will continue to be other directed and inefficient.

Managing your own time demands a personal awareness of your priorities. You know what you have to do, and it is up to you to get it done. As an old friend once said, "I don't do much work myself. I spend my time seeing that others get it done." Saying "No" may be disappointing to the person making the request, but your priorities of necessity must take precedence.

You can acknowledge the request and compliment the person for his or her confidence in bringing the request to you, but you must say, "No!" if:

a. Somebody else can do it for you.

b. It isn't essential.

c. It is a responsibility that can be delegated.

d. You have more important responsibilities to meet.

DECISION-MAKING

The first priority of any leader is to get the job done.

Necessary management tools include communication, group problem-solving and decision-making skills.

Principals must foster communication among teachers, parents and students to establish well-defined patterns of organization, channels of communication and methods of procedure.

In this context, decision-making competencies include the following.

The principal:

- ☐ Recognizes when a problem exists and is able to identify it correctly.
- ☐ Clarifies problems through acquisition of relevant information.
- ☐ Determines what is fact and what is opinion.
- ☐ Clarifies the commitments.
- ☐ Assigns priorities to completion of problem-solving tasks.
- ☐ Seeks, identifies, and evaluates alternate solutions.
- ☐ Understands types of decisions which can be made -- e.g. terminal, interim, conditional -- and the likely consequences of making each type of decision.
- ☐ Seeks more information when necessary to solve a problem.
- ☐ Understands legal, economic, sociocultural, and policy limitations of the decision-making process.
- ☐ Distinguishes between decisions that are and those that are not one's direct responsibility in reference to both superior and subordinate personnel.
- ☐ Establishes procedures for decision-making in which community representatives, faculty, and students are active participants.
- ☐ Involves those persons who will implement the results of a decision in the making of that decision.
- ☐ Clarifies the commitments resulting from a decision to those who will carry it out and to those it will affect.

(Portions of the above from ACSA Operation's Notebook - No. 8 and Appendix A, "Skills Necessary for School Leadership," part of the Task Force Study from Assemblyman Dennis Mangers.)

TYPES OF EMERGENCIES ADMINISTRATORS SHOULD BE PREPARED FOR

The California Code mandates that all schools will have a Disaster Preparedness Plan to suit each individual school.

The plan for your school should be compatible with the Civil Defense and Disaster Plan.

CALIFORNIA ADMINISTRATIVE CODE - Title 5. Education - Article 2. Civil Defense Plans and Drills.

Section 560. Civil Defense and Disaster Preparedness Plans. The governing board shall:

(a) Adopt a written policy guideline for use by schools of the district in formulating individual civil defense and disaster preparedness plans.

(b) Require the principal of each school in the district to formulate and submit to the district superintendent for approval a civil defense and disaster preparedness plan for that school.

(c) Require each school to test its plan (other than fire drills) or each portion thereof on a rotating basis at least two times during the school year and keep a record of such tests. The record shall be maintained in the manner determined by the governing board, and available to the Department of Education upon request.

I. FIRE

A. Procedure - conducted once a month

- ☐ All school personnel and visitors are required to leave the buildings regardless of the activities in which they are engaged.
- ☐ Speed is subordinate to control and order. There is to be no talking, running, pushing or skipping steps or stairs.
- ☐ In the event of a blocked exit the class should know an alternate route.
- ☐ On reaching the assigned assembly area, teachers are to check the roll using attendance cards or registers, in order to account for every pupil present in class.

B. Administrator's Duties

- ☐ Responsible for supervision of fire drill.
- ☐ Shall make definite assignments to assure that all rooms, auditorium and lavatories are evacuated.
- ☐ Administrator or office manager will take whatever steps are necessary to protect school's vital records.

C. Custodian's Duties

- [ ] Report to prearranged stations so that all emergency facilities, such as gas shut-offs, standpipes, sprinklers, extinguishers, first aid stations, etc. may be operated if necessary.

D. Office Manager's Duties

- [ ] Assigned to call fire department in case of fire or turn in alarm at street fire alarm box.

E. Teacher's Duties

- [ ] Shall supervise exit of group in an orderly manner.
- [ ] In the event of a blocked exit, the teacher shall know alternate routes and shall guide group to proper route.
- [ ] Shall call roll to verify that all members of the class are present. Teachers shall remain with their class.

II. EARTHQUAKE

A. If inside building:

- [ ] Get under some equipment (desk, table, etc.) where available.
- [ ] Drop to knees with back to windows and knees together.
- [ ] Clasp both hands firmly behind head, covering neck.
- [ ] Bury face in arms, protecting head. Close eyes tightly.

B. If outside building:

- [ ] Pupils shall get clear of all buildings and remain there until further instructed.

III. SURPRISE ATTACK

A. Signal

- [ ] No school signal.
- [ ] Teacher gives command of "DROP."
- [ ] What must be done is done immediately.

B. Surprise Attack - If inside building, pupils shall:

- [ ] Get under equipment, (desk, table, etc.) where available.
- [ ] Drop to knees with back to windows and knees together.
- [ ] Clasp both hands firmly behind head, covering neck.
- [ ] Bury face in arms, protecting head. Close eyes tightly.

C. Surprise Attack - If outside buildings, pupils shall:

- ☐ Crouch or lie down behind any protection, (curb, bench, ditch, or gutter) if within a step or two.
- ☐ Drop to the ground and curl up with back to blast, or light, if he/she is in the open.
- ☐ In case of actual surprise attack, flash of light is the only warning. If this occurs, teacher shouts "DROP" while protecting himself/herself. This procedure is applicable to all persons, regardless of age or location.

IV. BOMB THREAT

A. Telephone Security Section or District Office at once.

- ☐ District Office will notify police in area of school, the Office of Emergency Services, Division of Educational Services, and the Public Information Office.
- ☐ Police Officers are instructed to respond to such calls without the use of sirens.

B. After conferring with the District Office, the principal shall call the local fire department if he/she feels it is necessary to do so.

C. Decision to hold fire drill or take other action is made by the administrator.

D. No publicity should be initiated regarding the threat even within the schools. Publicity about this type of incident could mean more threats.

V. FLOODS

Students remain in the classroom with teacher supervision until decision and direction from the principal.

VI. FALLEN AIRCRAFT

Students remain in the classroom with teacher supervision until decision and direction from the principal. Principal or designated person in charge notify the police department and the fire department.

VII. EXPLOSION

Drop command is to be given immediately. If the explosion occurs within the building, the teacher will then implement action.

- ☐ Leaving building.
- ☐ Sound the school fire alarm.

- [ ] Move to an area of safety, and maintain control of students.
- [ ] Render first-aid as necessary.
- [ ] Notify fire and police departments.
- [ ] Fight any small fires without endangering lives.
- [ ] Notify district office.
- [ ] Notify utilities in the event of utility failure.
- [ ] Principal direct further action as required.
- [ ] Students and staff must not return to school until area is declared safe.

VIII. CHEMICAL ACCIDENT

- [ ] Remain in classroom until directions are received from principal.
- [ ] If necessary to evacuate buildings (school), move cross wind.

IX. DISASTERS OCCURING WHILE PUPILS ARE ENROUTE TO OR FROM SCHOOL

The following information should be given to pupils:

A. Earthquake - Get clear of all buildings. Assume "DROP" or "DUCK AND COVER" positions.

B. Surprise Attack - Seek any type of protection, (curb, bench, ditch, or gutter).

- [ ] Crouch and lie down in a "DUCK AND COVER" position with eyes protected and backs toward the blast of light.
- [ ] Remain in this protective position for brief time and then get under cover.
- [ ] Follow directions of recognized authority or follow instructions of child's parent concerning these conditions.

C. Take Cover - Go to the nearest available shelter. Remain there until instructed to leave.

D. Alert - Go home by most direct route as soon as possible.

X. SCHOOL BUS

A. Earthquake or Surprise Attack - Driver will stop bus immediately and command pupils to "DROP" in aisles or under seats for protection.

B. Take Cover - Driver will pull bus out of traffic and park in nearest off-street parking area. He/She will command pupils to find shelter or take cover under seats of bus.

XI. CAMPUS DISORDER

- ☐ Call the District Office.
- ☐ Notify the proper law enforcement agency.
- ☐ Cause all students to report to class.
- ☐ Attempt to maintain a regular schedule.
- ☐ Heighten campus supervision for the following day.

References:

Liability of Employees for Civil Damages for Injury During Fire or Other Drill - Ed. Code - 32200.

PUBLICATIONS TO ASSIST ELEMENTARY PRINCIPALS

MANAGING CONTRACTS

Strike Manual - Practical Techniques on How to Plan to Keep Schools Open
A29 - $5.00 each, members; $8.00 each, non-members.

Strike Communications: Before, During and After - Keys to success. Practical suggestions on how a district can establish communication channels that will work during a strike. Suggestions for the role of the principals, board members, superintendent & public information person. What to say, & how do you say it? Thoughts on working with the media, communicating with employees. 35 pages of sample letters, news releases, & checklists of what to do.
A48 - $3.00 each, members; $5.00 each, non-members.

The Grievance Handbook - 68-page practical guide on How to Develop Procedures and Sample Forms.
A30 - $5.00 each, members; $8.00 each, non-members.

Contract Language Or Analysis Of A Sample Agreement Under The Rodda Act
B31 - $4.00 each, members; $7.00 each, non-members.

School Strikes/Prevention and Settlement - published 1971, 45 pages.
B32 - $.75 each, members and non-members

Contract Management - Presenters Guide: This workshop is designed particularly for building level administrators, but good information for central office employees. Collective bargaining necessitates that management personnel attain skill and expertise in contract management if they are to effectively manage the employer's negotiated contract. This workshop discusses contract management as it relates to California's Public Education Collective Bargaining Law.
C13 - Cost of Presenters Guides as follows:

Type of Organization	*Purchase*	*Rental*
Other Educational Agencies	*$50.*	*$30.*
California School Districts	*$40.*	*$20.*
ACSA Regions and Charters	*$30.*	*$15.*

INSTRUCTIONAL PROGRAM

Operations Notebook No. 20, Staff Development: Or Gettin' The Act Together - What are the Promising Practices and Potential Problems in California? Practical ideas, potential sources of funding - Assistance for the central office or site administrator. (57 pages)
A2 - $2.00 each, members; $4.00 each, non-members

School Management Digest - Series 1, No. 3, The Principal As Instructional Leader - (32 pages)
A25 - $1.75 each, members; $2.75 each, non-members.

Helping The Teacher Utilize Aides - By Jack Saunders, Donald Ferguson, Robert Wright, James Olivero. Represents an attempt to provide some clarification about the roles of teachers and teacher aides in a dynamic classroom. While articles have been published with the intent of finding better ways to help the teacher do "the same old things," this book assumes the need to do things better. These things should more closely reflect the needs of children than perhaps they have in the past. The authors believe the book provides a realistic transition from theory to practice. (174 pages, 1971)
A52 - $4.50 each members and non-members.

CATEGORICAL PROGRAMS

Operations Notebook No. 18 - School Community Councils and Advisory Boards, A Notebook for Administrators - Why? Who? What? When? How? - Specific answers and ideas for implementation. (44 pages)
A4 - $2.00 each, members; $4.00 each, non-members.

Operations Notebook No. 16 - Working With Advisory Committees - Promising Practices and Techniques to make meetings more effective. (32 pages)
A7 - $2.00 each, members; $4.00 each, non-members.

Presenters Guide - Advisory Committees - Examples and guidelines are given for a number of types of advisory committees. Some items covered are district and individual school advisory committees on budget priority, educational policy planning, fiscal management, and curriculum and instruction committees.
C9 - For price see previous entry - Contract Management

SCHOOL CLIMATE

Operations Notebook No. 19 - Improving School Climate - Over 100 practical ways an administrator may examine and improve the student-staff school climate. A good climate makes it possible to work productively towards important goals, e.g.: academic learning, social development and curriculum improvement - Helps make school a place where both adults and students are willing to spend a substantial portion of their working time - Techniques can be adapted to large or small schools. (38 pages)
A3 - $2.00 each, members; $4.00 each, non-members.

Operations Notebook No. 17 - Discipline . . . Number One Problem In The Schools? - 40 Positive, Preventative Prescriptions For Those Who Care. (61 pages)
A6 - $2.00 each, members; $4.00 each, non-members.

Operations Notebook No. 5 - An Organic Guide To School Public Relations - "Public relations is basically what people think about an institution" - This notebook is a completely new publication crammed with practical ideas for site administrators or the district's public relations person - Inexpensive ways and techniques to build two way communication and understanding with your many publics. PR is everyone's business! (50 pages)
A5 - $2.00 each, members; $4.00 each, non-members.

Operations Notebook No. 8 - Time Management - Practical ideas and reminders of ways to organize and cope with the ever increasing demands upon your time. (28 pages)
A13 - $2.00 each, members; $4.00 each, non-members.

Administrator Renewal . . . The Leadership Role In Collegial Team Development - Reports the results of individualized continuing education programs for school administrators and offers practical recommendations for implementing a systematic plan. The monograph assists the leader of a collegial team providing a plan for a district program coordinator. Leadership roles characteristic to essential roles on the collegial team are reviewed. In addition, possible external resources are identified. (69 pages, 1974)
A45 - $4.50 each, members and non-members.

School Management Digest, Series 1, No. 1 - Vandalism Prevention (32 pages)
A24 - $1.75 each, members; $2.75 each, non-members.

School Management Digest, Series 1, No. 5 - Student Rights & Student Discipline (32 pages)
A27 - $1.75 each, members, $2.75 each, non-members.

Presenters Guide - Time Management - Various techniques are described which assist the school administrator in making better or more productive utilization of his/her time. The program is designed to be implemented immediately and covers such areas as: finding time often overlooked, correspondence, telephone, visitors, meetings, office procedure, using secretarial time wisely, and delegation.
C4 - For price see previous entry - Contract Management

Presenters Guide - Improving School Climate - Clearly there are a number of constraints which get in the way of positive interactions between students, teachers, administrators, parents in most of today's schools. This Presenters Guide builds off of the early research and development conducted by the Denver-based CFK Ltd. Foundation. Both specific and general suggestions for improving the school climate are included in the program format. Specific action plans for improving the climate are anticipated outcomes for the workshop.
C7 - For price see previous entry - Contract Management

Presenters Guide - School Public Relations - The important roll every member of the school staff plays in a good public relations program is stressed. This includes: the secretarial staff, custodians, aides, teachers, bus drivers, and administrators. Suggestions are given relative to both individual school and district-wide programs. Areas included are: news releases, ideas for topics, use of telephones, visitors, and common pitfalls in public relations programs.
C10 - For price see previous entry - Contract Management

Presenters Guide - Positive Discipline Alternatives - As indicated in the most recent Gallup Polls, discipline is a primary concern for teachers, administrators, and parents. Undoubtedly, to bring about change consideration must be given to the causal factors -- and that is the focus of this Presenters Guide. Specific suggestions are given about programs

that have worked in a variety of other schools and districts. Focus of the workshop is on prevention rather than remediation.
C14 - For price see previous entry - Contract Management.